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AREA AND INDUSTRIAL DEVELOPMENT PUBLICATIONS (No. 22)

AREA DEVELOPMENT DIVISION, *Victor Roterus, Chief*

ECONOMIC OUTLOOK AFTER PEAK OF DEFENSE EXPENDITURES

Markets After the Defense Expansion

A January 1953 publication of the U. S. Department of Commerce indicates that security expenditures will range from \$55 to \$60 billion some time in the latter half of 1953 and continue at that approximate rate during most of 1954, with a reduction in 1955 to about the \$50 to \$55 billion range.

This study shows that business expects its expenditures for plant and equipment in 1953 will about equal the 1952 record total. By 1954 a reduction may take place, but no very sharp change in that year was revealed by the survey returns from business. A continuation of residential construction at high levels for another year or two is expected, with a drop thereafter to somewhat lower levels unless an unprecedented replacement demand is created. Most businessmen feel that their current inventories of civilian goods are about right, but in the next few years the movement of civilian inventories probably will reverse direction more than once. A decline has already occurred in the rate of increase in business inventories required to support defense expansion, and liquidation of this type of inventories may begin in 1954 or earlier, considerably before defense buying decreases.

Consumer spending in the future will depend largely upon the trend of disposable personal income, which in turn will be governed largely by the level of business activity and tax rates. Fluctuations in commercial exports are not expected to have an important independent influence on the volume of domestic production. With respect to the outlook for markets as a whole, any change in the military program now under review by Congress in connection with the fiscal 1954 budget can of course make a difference in future trends, but there appear to be prospects of another year of good business in 1953. It is stated that a downturn in 1954 is a real possibility and that the projected reduction in defense spending in 1955 would test the strength of the economy. A lowering of Federal tax rates concurrently with the drop in defense outlays, and an increase in civilian purchases by State and local governments are mentioned as the chief forces now foreseen (aside from deliberate steps to prevent business recession) as a stimulus to private spending.

Sustaining Economic Forces Ahead

The staff of the Joint Committee on the Economic Report (82d Congress) has likewise studied the probable effect of reduced outlays for defense facilities expansion after the peak of defense expenditures and points out that "It would be a tragic mistake to base our confidence in the economic outlook on the high level of Government expenditures for

defense. There are other more powerful forces sustaining the economy at high levels." Population growth is cited as outstanding among these other influences, for the prospective level of 175 million in 1960 will mean a gain of approximately 24 million during the 1950's as compared with about 19 million for the 1940's. To house this increase without reducing present standards would mean that housing requirements for the remainder of the 1950-1960 decade will at least average as high as the annual average constructed during the "good years" 1947 to 1952.

The Committee release concludes: "Taken as a whole, the evidence accumulated in this report indicates that, in most lines of investment, the 'good' years of the recent past may well become the normal pattern for the years ahead. It is estimated that the investment needs to be met by 1960 in the areas enumerated in this report will reach \$500 billion at today's prices. (Housing, \$100 billion; producers' durable equipment and nonresidential construction, \$300 billion; highways, \$60 billion; schools and hospitals, \$40 billion.)"

1960 Prospects, Based on Alternate Assumptions

A report by the National Planning Association "examines the changes which might take place if the national security program should be reduced from a possible \$60 billion peak to a 'maintenance' level of \$40 billion, or possibly \$50 billion, by 1960." It shows that during this period our economic potential will increase by about 29 percent over the level of 1951, which means an increase in our gross national product from \$329 billion to \$425 billion, measured in terms of 1951 prices. "To take the place of defense demand, either consumption, domestic business investment, net capital export, or nondefense government spending could increase not only in absolute dollars but also as a percent of total production." It analyzes the following six hypothetical patterns of a possible full employment economy for 1960, assuming for one set of patterns a level of national security spending of \$40 billion and for another set a \$50 billion level: (1) high consumption and high taxes, (2) high consumption and moderate taxes, (3) high domestic investment and moderate taxes, (4) both high domestic and foreign investment and moderate taxes, (5) very low taxes, and (6) very high government (Federal, State and local) purchases and moderate taxes. On these bases an adjusted model is constructed which combines some features of each of the hypothetical models. These models are related to the budget and tax policies, private and public investment policies, and private and public price and wage policies needed to maintain an economy of high level activity and stable prices. The conclusion is reached that certain adjustments in private and public policies must be made, but that large defense expenditures, though needed for security purposes, are not required as props for a prosperous economy.

Markets After the Defense Expansion, a publication of the U. S. Department of Commerce, is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. 1952. 90 pp. 55 cents.

The materials prepared for the Joint Committee on the Economic Report by its staff, entitled *The Sustaining Economic Forces Ahead*, may be obtained from the Joint Committee on the Economic Report, Washington 25, D. C., free, or from the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C., at 20 cents a copy. 1952. 70 pp.

The National Planning Association report, entitled *The American Economy in 1960*, by Gerhard Colm, with assistance of Marilyn Young, may be obtained from that association, 1606 New Hampshire Ave., N.W., Washington 9, D. C., as Planning Pamphlet No. 81, 1952. 166 pp. \$2.00—\$1.20 educational rate.

WATER RESOURCE DEVELOPMENT POLICIES

Reports on sources of disagreement between the Corps of Engineers and the Department of Agriculture in water resources development programs and on economic evaluation and allocation of costs have been made by the House of Representatives' Subcommittee to Study Civil Works, submitted to its parent Committee on Public Works.

Flood Control Program of Department of Agriculture

The Flood Control Act of June 22, 1936 is cited as the authority whereby Congress designated the Corps of Engineers to be in charge of flood-control works on the waterways or main streams, and placed "Federal investigations of watersheds and measures for runoff and water-flow retardation and soil-erosion prevention on watersheds" under the jurisdiction of the Department of Agriculture. The report makes 9 recommendations, the first three of which are as follows:

1. That legislation be enacted to cancel present directives and authority for the Department of Agriculture to make flood control surveys presently authorized under flood-control law or resolutions of the Committee on Public Works.
2. That no additional authorizations for examination and survey for flood control by the Department of Agriculture paralleling authorization of the Corps of Engineers be made.
3. That so much of the Flood Control Act of 1936, as amended and supplemented, as authorizes and directs the Secretary of Agriculture to cause preliminary examinations and surveys for runoff and water-flow retardation and soil-erosion prevention be repealed.

Civil Functions Program of Corps of Engineers

Referring to the very large volume of river and harbor and flood-control work authorized for prosecution by this agency, the large backlog of incompleeted surveys and the need for additional surveys in current problem areas, the subcommittee expresses the belief that there is a necessity of revising the program so as to bring it up to date and of then keeping it current.

Economic Evaluation of Federal Water Resource Development Projects

In this report it is concluded that economic evaluation is one of the most important elements for consideration in connection with any project. A benefit-cost ratio determined from an appraisal of estimated direct benefits and all direct costs necessitated to complete the project is described as extremely helpful as one measure of a project's economic merits, but it is warned that such a ratio is but an estimate and only one measure of the national and public worth of a project.

The Allocation of Costs of Federal Water Resource Development Projects

This report discusses various projects and practices and observes that "at the present time the agencies of the executive branch are operating in considerable confusion in the problem of allocation of costs. While Congress has in a few instances been specific in designating what agency should allocate costs and what purposes costs should be allocated to, it has not been adequately specific in outlining a policy to be followed in all instances....The subcommittee is favorably impressed by the separable costs, remaining benefits procedure that has been developed by the Inter-agency River Basin Committee.... The subcommittee is inclined to believe it desirable that this method generally be adopted for future use."

Each of the four reports discussed above is a *Report to the Committee on Public Works, House of Representatives*, by Mr. Jones of Alabama, from the Subcommittee to Study Civil Works, 82d Congress, Second Session. With the exception of the report on the Department of Agriculture, which is out of print but available for reference in Government depository libraries, these reports are available from the Committee on Public Works, House of Representatives, Washington 25, D. C. Dec. 5, 1952. Free.

COMMUNITY PILOT STUDY OF POST-ATTACK INDUSTRIAL REHABILITATION

To determine which problems of post-attack industrial rehabilitation can be faced locally and which must be resolved at higher levels of government, the National Security Resources Board (now merged with the Office of Defense Mobilization) authorized a community pilot operation in the San Francisco Bay Area. The San Francisco Bay Area Council and the Stanford Research Institute have now completed the study, which embodies the judgment of an industrial community as to means of preparing for such rehabilitation.

The four problem areas emphasized in the report are (1) physical rehabilitation, (2) production continuity, (3) manpower, and (4) priorities and legislation. As the report presents many specific recommendations for action by the Federal Government, State Governments, local area organizations, and individual plants in local areas it is of vital interest to industrial communities, local government and industry throughout the Nation. The report expresses the belief that ultimate responsibility for post-attack rehabilitation lies with the local community and that "Although in each major industrial community there must be an arm of the Federal rehabilitation authority, it should be one which has sufficient autonomy to initiate action locally within the framework of Federal policy, with local people manning the staff."

Community Plan for Industrial Survival, a study for the National Security Resources Board by the San Francisco Bay Area Committee on post-attack industrial rehabilitation, may be obtained from Stanford Research Institute, Stanford, Calif. 1952. 10 pp. \$2.00.

ARCHITECT'S PART IN CIVIL DEFENSE

A series of concise booklets on civil defense has been prepared by the American Institute of Architects in close collaboration with Federal civil defense authorities. The titles listed below indicate the subject matter of each release.

Civil Defense: The Architect's Part, 23 pp.; *Defense Measures in Industrial Plants*, 8 pp.; *Defense Measures in Multi-Story Buildings*, 12 pp.; *Defense Measures in Schools*, 8 pp.; and *Defense Measures in Hospitals*, 10 pp. All of these pamphlets were published in 1951-1952 and are available from the Publications Order Dept., The American Institute of Architects, 1741 N.Y. Ave., N.W., Washington 6, D. C., at 25 cents each.

PLANT LOCATION AND INDUSTRIAL DEVELOPMENT

An ever-growing amount of helpful information bearing on the solution of plant location and industrial development problems is becoming available, as is indicated by the items which follow.

Plant Location Manual

A work on location of industrial plants, which distills years of experience of a successful factory locating service, is now available. The need for such a work is indicated in the statement that while great technological progress has been made by the more than 300,000 manufacturing firms in the United States, the techniques for determining where new plants should be built have not kept pace with this progress. One of the most helpful features of this work is the section devoted to hints for industrial development groups, including sources of leads. As indicative of development possibilities that may be uncovered is mentioned a recent study of the factory locating service which revealed that only 13,560 tons of a building materials product were manufactured in a Central State, whereas 96,000 tons of it were consumed in that State.

Plant Location, by Leonard C. Yaseen, Senior Partner, Fantus Factory Locating Service, is published by Business Reports, Inc., Roalyn, N. Y. 1952. 149 pp. \$12.50.

Handling Industrial Inquiries

A large amount of information on handling industrial inquiries and dealing with industrial prospects has been prepared by the California State Chamber of Commerce for the use of chambers of commerce in that State, but should also be useful elsewhere.

How to Handle Industrial Inquiries, in processed form, may be obtained from Mr. Herbert F. Ormaby, Director, Research Dept., California State Chamber of Commerce, 350 Bush St., San Francisco, Calif. 1952. 16 pp. Free.

Program for Locating the New Plant

An article suggests a complete procedure for determining plant location, citing experience of business firms at each stage. A consulting engineer, for instance, claims

that the first step in every location study is the one most frequently overlooked, namely, determining the real objectives of the new plant. Subjects discussed include the numerical weighting of location factors, means of reducing the task to manageable proportions, sources of information, making contacts, and the decision.

"A Program for Locating the New Plant," by Robert M. Atkin, is a 9-page reprint of an article which appeared in the November-December 1952 issue of *Harvard Business Review*, Soldiers Field P.O., Boston 63, Mass. \$1.00 for single copy, \$1.30 for two copies, etc.

Special Plant Location Inducements Surveyed

A recent release on special inducements to influence plant location incorporates findings of a previous ASPO study which lists the following as permitting municipalities to issue bonds (general obligation bonds in Mississippi, revenue bonds in all others): Alabama, Illinois, Kentucky, Mississippi, Tennessee and Puerto Rico. In addition to such instances of specific authorization, a broad law that establishes local authorities in Pennsylvania permits cities in that State to issue bonds for the purpose of building factories (the city of Hazleton has taken advantage of this authority).

With respect to exemption and preferential taxation it is noted that a study made by the National Association of Assessing Officers in 1949 showed that 17 States and Alaska allow some preferential tax treatment to industrial property. States offering permanent tax preference for personalty are shown to be Massachusetts, New York, Ohio, Pennsylvania, and Virginia. For temporary exemption of real estate the following States are cited: Alabama, Arkansas, Louisiana, Mississippi, Oklahoma, Rhode Island, South Carolina, and Vermont. As offering both permanent tax preference for personalty and temporary exemption for real estate, the report lists Delaware, Kentucky, and Maryland.

The recent release adds to the foregoing findings information as to special tax exemptions permitted in Alabama, Arizona, Arkansas, Georgia, Idaho, Kentucky, Louisiana, Maryland, Michigan, Minnesota, Mississippi, Montana, Pennsylvania, Rhode Island, South Carolina, and Vermont.

The previous study mentioned is the Planning Advisory Service Report No. 22, *Community Inducements to Industry*, published by the American Society of Planning Officials, 1313 East 60th St., Chicago 37, Ill. Jan. 1951.

Report of Study on Special Inducements to Influence Plant Location, by Albert E. Redman, Director, Industrial Development Department, Ohio Chamber of Commerce, 820 Huntington Bank Bldg., Columbus 15, Ohio. Revised Oct. 1, 1952. 13 pp. A limited number of copies is available upon application to this address.

Evaluation of Area Efforts to Attract and Build Industry

A survey made three years ago to ascertain how communities in the Third Federal Reserve District have been using their own capital to attract and expand industry has been brought up to date. Especially interesting is the account of operations of industrial development corporations or foundations. An example is the one-industry (railroad repair shops) town of Altoona, which found itself vulnerable to sudden economic changes and formed in 1946 Altoona Enterprises, Inc. After operating the corporation for a while on a hand-to-mouth financial basis the city developed the Altoona Industrial Payroll Insurance Plan, by which business firms and others make outright contributions into a common fund. To date \$600,000 has been raised by this method, part of which was presented to one company and part used to build a plant. Towns in the anthracite area, notably Scranton, have been the most active in promoting industrial development.

It is observed that from a broad economic viewpoint it would be desirable for such activities to move against the business cycle, increasing in depressions and decreasing during booms. Yet it appears that a community can be most successful, at less cost, in times of rapid business expansion, and least successful, at more cost, when business is not expanding so much.

"Operation Boot Strap—A Second Look" is a 9-page article appearing in the December 1952 issue of the *Business Review*, published by the Department of Research, Federal Reserve Bank of Philadelphia, Phila. 1, Pa. Free.

State and Local Taxation as Industrial Location Factor

Studies have been made in a number of States of the relative importance of State and local tax structures in influencing industrial location, and a number of such studies are reviewed briefly in a recent article. At the outset it is stated that even if a firm could neglect all location factors except that of taxation, the problem would remain very complex because of such variables as property exemption, assessment practice, incidence of business taxes, and the provision of government services.

A University of North Carolina study measures actual differences between State and local tax bills of identical firms located at various sites, computing hypothetical tax bills for selected hosiery, furniture and cigarette manufacturing companies at 96 urban and rural sites, selected from 19 States. Although these computations indicated large variations between tax bills computed for different States, it was discovered that few locations offer uniformly high or uniformly low tax loads to all types of industrial firms. The conclusion was reached that for most manufactured products, the probable influence of taxation upon demand appears to be negligible compared with other demand determinants, and that "tax considerations do not influence the locational choices of industrial firms which must locate in the same taxing jurisdictions as their customers." The statistical findings run contrary to a number of widely-held beliefs. They indicate, for instance, that in Massachusetts, where the textile industry has been in a relative decline, a typical hosiery firm in a representative locality would actually enjoy a lower State and local tax bill than in most Southern States, where that industry is growing.

Both studies indicate that taxation differentials do not represent much of a "pull" in industrial location.

"Taxes and Industrial Location," by John D. Garwood, appears in the December, 1952 issue of *National Tax Journal*, published by the National Tax Association, P.O. Box 1799, Sacramento 8, Calif. 5 pp. Single copy \$1.50.

Effects of Taxation on Industrial Location, by Joe Summers Floyd, Jr. The University of North Carolina Press, Chapel Hill, N.C. 1952. 155 pp. \$3.00.

Transportation Factors in Newsprint Marketing

A current study examines the significance of transportation costs and services in the marketing and flow of newsprint from the mill-manufacturer to the consumer-publisher and evaluates the relationship of such transportation factors to newsprint supply, cost, pricing, and newsprint plant location.

Transportation Factors in the Marketing of Newsprint, by Edward Margolin and William P. McLendon, was prepared in the Office of Transportation, U. S. Department of Commerce and is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. 1952. 126 pp. 40 cents.

Quality and Treatment of Water in West

A discussion of this subject, important in plant location, and a tabulation of analyses of water supplies in the principal cities and towns in the eleven Western States, claimed to be compiled for the first time, is available. A key indicates whether or not the water is soft, suitable for boiler feedwater with internal treatment chemicals alone; moderately hard, suitable for boiler feedwater with internal treatment chemicals only, but needing presoftening for economy; hard, requiring excessive amounts of internal treatment chemicals for boiler feedwater, with presoftening almost mandatory; very hard, necessitating presoftening; suitable for zeolite softening; hot lime soda softening desirable for boiler feedwater—possibly more efficient than zeolite softening; silica above desirable value—may be a problem in boilers; special study recommended.

Quality and Treatment of Water in the West, by Ray W. Hawksley, is a reprint of a series of articles published in *Western Industry*. Available from King Publications, 609 Mission St., San Francisco 5, Calif. 1952. 21 pp. 50 cents.

Typical Electric Bills in 1952

Compilations of typical electric bills as of January 1, 1952 are available separately for (1) typical residential electric bills for cities of 2,500 population and more and (2)

typical electric bills for residential, commercial, and industrial service in cities of 50,000 and more. Such data have a bearing on comparable living and business costs and therefore are pertinent in industrial and business location.

Typical Residential Electric Bills 1952, FPC R-45, 74 pp., and *Typical Electric Bills 1952*, FPC R-44, 36 pp., may be obtained only from the Federal Power Commission, Washington 25, D. C. 50 cents each.

More Industrial Development Foundations Planned

The trend toward formation of industrial development foundations to encourage the development of new industry in New England is mentioned in a current release. New Hampshire's experiment is less than a year old, the Rhode Island legislature is reported as having just enacted enabling legislation by unanimous vote, advisory committees of the Vermont Development Commission and the Connecticut Development Commission are reported as recommending immediate action to establish such corporations, and study of the problem is under way by the Massachusetts Industrial Commission. The Michigan Economic Development Commission is appointing a committee to recommend whether or not such a corporation should be established in that State.

Newsletter, mentioned in Michigan Department of Economic Development, P. O. Box 1286, Lansing, Mich., published as a service to chambers of commerce and other business development groups in Michigan. The director of the Department's Industry Service Division has written a report on interviews in New England with representatives of existing and proposed industrial development foundations.

Planned Industrial Centers in New England

A dozen planned industrial centers have been established in New England since 1945, ranging from the redevelopment of vacant shipyards to entirely new construction on previously vacant land. They have been sponsored by private real estate developers, manufacturers, distributors, and civic groups. A current article describes the nature of these centers, their operations, and their advantages. The U. S. Department of Commerce expects to publish about mid-year a national study of planned industrial centers.

"Planned Industrial Centers," a 3-page article in the February 1953 issue of *Monthly Review*, published by the Federal Reserve Bank of Boston, Boston, Mass.

Texas Consumption of Outside Chemicals and Allied Products

An analysis of Texas purchases of outside chemicals and related products and the techniques involved are of interest in revealing new local industrial opportunities.

Out-of-State Purchases of Chemicals and Allied Products by Texas Organizations, 1951, by James R. Bradley, W. B. Langford, and L. S. Paine, is available as Research Report 37 from the Texas Engineering Experiment Station, The Texas A. and M. College System, College Station, Texas. 1952. 8 pp.

Tacoma Report Makes Specific Industrial Development Recommendations

Recommended programs to expand market coverage by existing firms, initiation of a new product development program which would draw ideas from the entire community, and a plan to secure manufacturing and sales rights from Eastern firms are examples of workable programs suggested in a Tacoma report for the development of the area's industry.

A Plan and Program for Payrolls and Prosperity for Tacoma, by A. E. MacInnis, is available from the author, 702 No. Eye St., Tacoma, Wash. 1952. 16 pp.

British Study of Cost of Industrial Movement

Lack of industrial workers in some areas and pockets of unemployment elsewhere have led many British firms which lacked workers to open branch plants in areas where labor was available. A current release gives tentative results of a study of costs at the new plants as compared with costs which would have been incurred through expansion of the main plants. Branch plants of a group of shoe manufacturers experienced much higher total costs in the first year of operation, but these fell sharply over the first three years. It was found that production could have been increased and costs lowered if more key-workers could have gone to the new plants. In the boot and shoe firms studied it was

found that little advantage was taken of new branch plants as an opportunity to reorganize and improve production methods.

The Cost of Industrial Movement, by W. F. Luttrell, published as Occasional Papers XIV of the National Institute of Economic and Social Research. Cambridge University Press, American Branch, 32 East 57th St., New York 22, N. Y. 1952. 104 pp. \$3.75.

CENSUS NOTES

How Business Uses the Censuses

An article discusses briefly the five major censuses (population, housing, business, manufactures, and agriculture) as to census years and content, and their application to methods of selling a product and where and how much will be sold.

"How Business Uses the Censuses," by Harry Deane Wolfe, director of market research for Colgate-Palmolive-Peet Co., a 3-page article in the October 1952 issue of *Review of New Jersey Business*, Rutgers University Press, New Brunswick, N. J.

1953 Censuses of Industry, Trade and Transportation

Censuses of manufacturing, mineral industries, wholesale and retail trade, services and transportation will be taken early in 1954 covering the year 1953. The Census of Manufactures will cover, for an estimated 275,000 factories, common inquiries as to plant identification, kind of industry, employment, payrolls, hours of work, cost of materials consumed, power equipment, water consumption, and value of products shipped.

The Census of Mineral Industries will collect data, for the first time since 1939 and for approximately 35,000 mines, quarries, and oil and gas establishments, on the number, size, location and character of operations in the mineral industries, as well as data on number of workers, value of products, principal expenses, expenditures for plant and equipment, quantity of fuels and electric energy consumed, and horsepower of power equipment installed.

The Census of Business will cover about 3 million retail, wholesale, and service establishments; theaters and other amusement places, and hotels and tourist courts. Inquiries will relate to location, kind of business, corporate relations, employment and payrolls, operating expenses, inventories, annual sales, credit sales, and merchandise line sales.

The Census of Transportation will be more restricted in scope than the other phases of the 1953 censuses, for statistics already are regularly available for those transportation systems which are required to file reports with Federal regulatory agencies. Such available data will be augmented through a series of surveys designed to fill in the two major gaps, namely truck ownership and transportation (except carriers reporting to I.C.C.) and transportation service used by manufacturers. The census data will be combined with data available from other agencies and published as a Handbook of Transportation Statistics, the first of its kind and scope.

Census Geographic Reports and Maps

The following releases in the *Geographic Reports* series are available without charge from the Bureau of the Census, Washington 25, D. C.: *Municipal Annexations and Detachments*, April 2, 1950-April 1, 1951, Series Geo. No. 3; *Population Density Map of the United States by Counties: 1950*, Series Geo. No. 4; *Land Area and Population of Incorporated Places of 2,500 or More: April 1, 1950*, Series Geo. No. 5; and *Minor Civil Divisions and Places of the United States: 1950*, Series Geo. No. 6.

Separate maps recently published by Census (sold by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. at prices indicated) include:

State Minor Civil Division Maps, showing subdivisions of counties and location of all incorporated places and those unincorporated places with 1,000 inhabitants or more outside urbanized areas of larger cities. 36 x 48 in. 20 cents a sheet.

United States County Outline Map. Shows boundaries and names of all counties in U. S. 26 x 40 in. 30 cents.

U. S., Population Distribution, Urban and Rural: 1950. Urban population centers shown by red symbols, rural by green symbols. 40 x 62 in. 35 cents.

Map of U. S. Showing Location of Drained Agricultural Lands: 1950. Shows land in drainage enterprises and drained land in irrigation enterprises as revealed in 1950 Census. Three colors. 20 x 31 in. 30 cents.

Governmental Revenue in 1951

Tax collections of local governments in the United States represented \$56 per capita in 1951, according to an 11-page Census report bearing this caption, dated August 1952, available without charge from the Bureau of the Census, Washington 25, D. C.

State Tax Collections in 1952

A 10-page report bearing this caption, dated August 1952 and available without charge from the Bureau of the Census, shows that State tax revenue reached a record high in fiscal 1952, having moved upward for the 19th consecutive year.

Revised Household Projections

The Census Bureau's revised projections of the number of households, families and related units for July 1955 and 1960, taking into account data from the 1950 Census of Population and superseding similar projections made in 1946, are available in *Current Population Report Series P-20*, No. 42.

EXPANDING OUR INDUSTRIAL MIGHT

A report on the expansion of defense production facilities reveals that when the defense expansion is completed in 1955, we shall have doubled our production facilities in a decade and half. By the end of 1952, two-thirds of the planned expansion was to be in place and by the end of 1953 the expansion program should be about 94 percent complete.

A more recent release indicates the degree of geographic concentration of defense facility expansion projects. As of September 30, 1952, nearly 60 percent of the geographically distributed projects and over 56 percent of the total estimated cost of such projects were concentrated in seven States, for which values are given below:

State	Estimated cost	Value in place
	Millions of dollars	
Pennsylvania...	2,171.3	1,065.5
Texas.....	1,867.9	899.5
Ohio.....	1,261.2	790.4
Michigan.....	989.7	503.5
Illinois.....	799.8	392.3
California.....	743.5	388.6
Minnesota.....	646.6	136.7

Allocations by States are not made for projects involving transportation, storage and public utilities, estimated to cost \$8,009 million, or 35 percent of the total cost of all reported projects. These facts are presented in a press release which shows by industry the number of certificates of necessity and reported cost, and the value in place; also the distribution by State of the cost and progress of such projects.

Expanding Our Industrial Might, 1952, 30 pp., may be obtained free from the Production Section, Office of Defense Mobilization, New GAO Bldg., Washington 25, D. C.

"Facilities Expansion Program under Certificates of Necessity," press release DPA-522, is available from the Office of Defense Mobilization, Executive Office of the President, New GAO Bldg., Washington 25, D. C. Feb. 26, 1953. 7 pp Free.

REGIONAL ECONOMIC RESEARCH

The notable increase of regional economic research since the early thirties has coincided in time with a lessening of regional differences, according to a recent article. In contrast with the hundreds of national economic series presented each month in the *Survey of Current Business*, the regional researcher is indicated as fortunate to find as many as a dozen available for the local community—a reason given as explaining a "preoccupation with statistical trivia" on the part university bureaus of business research and others. These university bureaus have, however, played a leading role as "data developers," as have also the Federal Reserve banks.

"Regional Economic Research—An Appraisal," is a 6-page article appearing in the December 1952 issue of *Arizona Business and Economic Review*, published by the Bureau of Business Research, University of Arizona, Tucson, Ariz.

MISSOURI BASIN SURVEY COMMISSION REPORT

The commission established about a year ago to study the land and water resources of the Missouri River Basin and to make recommendations "for the better protection, development and use of those resources" has made its report.

The majority statement, made by 8 of the 11 members of the commission, recommends a 5-member Missouri Basin Commission, to be appointed by the President, to "direct and coordinate the activities of all Federal agencies relating to resource development within the basin."

The minority statement claims that the majority proposal means placing the ultimate power entirely in the Federal Government. General concurrence is indicated with the majority's recommendations as to powers and functions that a coordinating agency should have, but the minority feels that these "can best be worked out by common agreement between the State and the Federal Governments in the compact negotiations."

Missouri: Land and Water: The Report of the Missouri Basin Survey Commission is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. 1953. 295 pp. \$1.75.

POPULATION PROJECTIONS FOR PACIFIC NORTHWEST STATES AND REGION

Low, medium and high population projections are now available for the Pacific Northwest and separately for Washington, Oregon, Idaho, and 11 Montana counties, for the years 1960 and 1975.

Population Projections for the Pacific Northwest States and Region 1960 and 1975, prepared by the Subcommittee on Comprehensive Program and approved by the Columbia Basin Inter-Agency Committee, may be obtained from the Secretary of that Committee at 510 Failing Bldg., 618 S. W. 5th Ave., Portland 4, Ore. 1952.

POPULATION AND HOUSING CHARACTERISTICS OF METROPOLITAN AREAS

A textual and statistical comparison has been made of the 57 largest metropolitan areas in terms of 41 population and housing characteristics, based upon data from the 1950 and 1940 Census for such areas.

How Does Your City Rate?: Comparison of the 57 Largest Metropolitan Areas in 41 Population and Housing Characteristics, by Edward B. Olds, is published by the Research Bureau, Social Planning Council of St. Louis and St. Louis County, 505 N. 7th St., St. Louis 1, Mo. 1952. 112 pp.

SCHOOL ENROLLMENT FORECAST AND METHODOLOGY

Nationwide prospects of rapidly increasing needs for additional school facilities lend interest to a recent school enrollment forecast made for the Metropolitan District of Miami, and to the description of the methodology employed.

Forecast of School Enrollment, 1952 to 1962, For the Metropolitan District of Miami, Dade County, Florida, by Reinhold P. Wolff and Mable D. Mills. Bureau of Business and Economic Research, University of Miami, Coral Gables, Fla. 1952. 31 pp.

NEW PATTERN OF URBAN DECENTRALIZATION

The increasing number of urban-occupied persons who work in the city but dwell in the open country beyond the immediate urban fringe is cited in an article as the "new centrifugal movement" and thus distinguished from the older pattern of urban decentralization which has been confined mainly to a suburban trend. Reasons given for the "new" movement include the obvious ones of the private motor car, the all-weather highway, and extension of rural electrification; also the septic tank, the electrically-propelled pump, the general rise in real incomes, the high cost of city living, and the lure of the open country. There is described a pilot study of Columbia, Missouri, a city of 32,000 in 1950, which covered only open-country families residing at least a half mile beyond the city's boundaries and having one or more members gainfully employed in the city.

"Developing Patterns of Urban Decentralization," by Noel P. Gist, is a 9-page article appearing in the March, 1952 issue of *Social Forces*, printed for the University of North Carolina Press by The Williams & Wilkins Co., Mount Royal and Guilford Aves., Baltimore 2, Md. \$1.50 a copy.

REGIONAL APPLICATION OF "INTERINDUSTRY FLOW ANALYSIS"

Until recently interindustry economics, or the study of commodity and service flows among the Nation's industries, has been studied and applied only on a national basis. The first application of this interindustry flow analysis to the economy of a smaller area was made by the Federal Reserve Bank of St. Louis to its district. The Bank feels that "Applied in regional analysis, this new tool provides a new and sharply focused picture of important economic relationships in a region." The regional estimates presented are based on and tie in with the Interindustry Relations Study for 1947, a very large statistical study by the Division of Interindustry Economics, U. S. Bureau of Labor Statistics, covering the interindustry flow of commodities and services for all industries in the United States. The first part of the Federal Reserve study presents the balance of trade estimates for the District, while the second part presents data from which these estimates were made and suggests other uses for such an analysis.

Monthly Review, June 1952 issue, Federal Reserve Bank of St. Louis, St. Louis, Mo. 10 pp. plus detailed flow chart. Free. Information pertaining to the Interindustry Relations Study for 1947 is available free from the Bureau of Labor Statistics, U. S. Department of Labor, Washington 25, D. C. This national study is described in "The Interindustry Relations Study for 1947," by W. Duane Evans and Marvin Hoffenberg, reprinted from *The Review of Economics and Statistics*, Harvard University, Cambridge, Mass. 1952. 142 pp. \$1.00.

RAIL PRODUCT FLOWS BY STATES

In our bulletin of March 1952 (page 11) were mentioned instances of the use of "Sample Waybill Analyses" by the Interstate Commerce Commission, indicating rail flow of products between States and regions, to round out economic reports on certain areas. Recent ICC reports, now available, are indicated below. All are based on one percent samples of waybills. The mileage block distributions mentioned are shown for 25 such blocks, based on the indicated starting mileage—1 to 24 miles, 25 to 49 miles, etc.—up to 3,000 miles and over.

Mileage Block Distribution of Traffic and Revenue, by Commodity Class, Territorial Movement and Type of Rate, 1951, is available separately for each of the following: Products of Agriculture, Animals and Products, Products of Forests, Products of Mines, Manufactures and Miscellaneous and Forwarder Traffic. *State-to-State Distribution of Products of Agriculture: Traffic and Revenue, State-to-State Distribution of Animals and Products: Traffic and Revenue, State-to-State Distribution of Products of Forest: Traffic and Revenue, State-to-State Distribution of Products of Mines: Traffic and Revenue, State-to-State Distribution of Manufactures and Miscellaneous and Forwarder Traffic (C.L.): Traffic and Revenue, and State-to-State Distribution of All Commodities Combined: Traffic and Revenue*, all for 1951: *State-to-State Distribution of Carload Tonnage by Major Commodity Groups, 1950: New England States, State-to-State Distribution of Carload Tonnage by Major Commodity Groups, 1950: East South Central States, State-to-State Distribution of Carload Tonnage by Major Commodity Groups, 1950: Middle Atlantic States, and State-to-State Distribution of Carload Tonnage by Major Commodity Groups, 1950: Pacific States* are also available in separate analyses. These processed reports may be obtained without charge from the Bureau of Transport Economics and Statistics, Interstate Commerce Commission, Washington 25, D. C.

CONSTRUCTION INDUSTRY AND THE ECONOMY

A recently available study inquires into reasons why the construction industry's activities fluctuate more violently than do most forms of economic activity, with recurring adverse effects on the industry itself and on industries which supply it, and examines proposed remedies for this malady. A notable contribution is the searching analysis of debated proposals (1) to vary the volume of construction in a contracyclical manner to aid in stabilizing the general economy or (2) to maintain an even volume of construction at all times in order to neutralize construction as a major disrupting force.

Stabilizing Construction: The Record and Potential, by Miles L. Colean and Robinson Newcomb, is a research study for the Committee for Economic Development. McGraw-Hill Book Company, Inc., 330 West 42nd St., New York 36, N. Y. 1952. 340 pp. \$6.00.

WASHINGTON STATE WILDLIFE RESOURCES SURVEYED

On the basis of a mail questionnaire sent to a random sample of resident license holders in the State of Washington, a recent study estimated that \$100,000,000 was spent in that State during 1950 for wildlife or in its pursuit, including approximately \$20,000,000 paid for the State's catch of commercial fish. It is pointed out that a few other States have tried to measure the economic and business significance of their wildlife resources, but that most of these studies have been of such dissimilar nature as to render comparisons between States difficult.

Economic Aspects of Wildlife Resources of the State of Washington, by Robert F. Wallace, is published by the Bureau of Economic and Business Research, The State College of Washington, Pullman, Wash. 1952. 42 pp. \$1.00.

GUIDE FOR SURVEYS, POLLS AND SAMPLING

A comprehensive discussion of surveys, polls and sampling describes step by step procedures for carrying out such investigations as consumer and market surveys, surveys of the census type, and social surveys, including preparation of a survey report. An 88-page bibliography is included.

Surveys, Polls & Samples, by Mildred B. Parten. Harper & Brothers, Publishers, 49 E. 33d St., New York 16, N. Y. 1950. 624 pp. \$5.00.

GROWTH INDUSTRIES

A current article which identifies rapidly growing, moderately growing, and declining industries in the United States will be of special interest to those concerned with industrial development work, as the "growth" industries are naturally the most active in expansions and branch plant locations. A table shows physical production trends of over 160 selected industries and products in the period 1940 to 1951, classified according to the three growth characteristics just mentioned.

"Growth Trends in the Economy," an article by Louis J. Paradiso and Francis L. Hirt, appearing in the January 1953 issue of *Survey of Current Business*, published by the Office of Business Economics, U. S. Department of Commerce, and for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. Single copy 30 cents.

ANTHRACITE AREA OF PENNSYLVANIA

An economic base study of the Northeast industrial area of Pennsylvania is of special interest because of the fact that its anthracite mining counties have experienced increasingly high unemployment during the last three decades. The report strikes a hopeful note in the expectation that the creation of a steel-producing center in the Delaware River Valley north of Philadelphia will have a most important effect upon the economy of Pennsylvania and neighboring Atlantic Coast States.

A Summary of the study appears in the *Economics and Business Bulletin*, September 1952 issue, published by the School of Business and Public Administration, Temple University, Philadelphia 22, Pa., which made the study. 1952. 44 pp. The detailed conclusions for each industry studied are incorporated in the research sections of the study, available from the Pennsylvania Bureau of Employment Security, Harrisburg, Pa.

URBAN INDUSTRIAL STUDY

A summary report of the Chicago industrial study published recently by the Chicago Plan Commission makes recommendations whereby it is claimed that the demand for land can be met; proposes an "industrial performance code" with specifications governing industrial layout, and proper planning of thoroughfares, truck routes, and mass transportation; recommends eventual relocation to industrial districts of many plants now in residential neighborhoods as a means of eliminating truck and employee traffic and parking from the residential areas; and proposes, as a necessary part of the preparation of the City Plan, a further review of Chicago's railroad pattern to determine the possibility of some consolidation of railroad lines.

Chicago Industrial Study: Summary Report is published by the Chicago Plan Commission, Chicago, Ill. 1952. 58 pp.

DESIGN OF INDUSTRIAL PLANTS

The major forces affecting the design of industrial plants and the relationship of plant design to community planning are considered in a collection of conference papers and statements. Included are papers on the design of industrial plants, plant design and human relations research, color in industrial plants, organized industrial districts, and industrial plants and community relations.

The Design of Industrial Plants—Papers and Statements Presented At The Tenth Ann Arbor Conference, November 6 and 7, 1952, is available from the College of Architecture and Design, University of Michigan, Ann Arbor, Mich. 102 pp. \$1.00.

ROLE AND PROBLEMS OF SMALL BUSINESS

"Contrary to the opinions of many people, the evidence today indicates a declining concentration in American business....This means that smaller firms are increasing their share of the market at the expense of the larger ones," states a currently released booklet on the role and problems of small business.

Small Business: Its Role and Its Problems may be obtained from the Economic Research Dept., Chamber of Commerce of the United States, Washington 6, D. C. 1953. 33 pp. 50 cents.

COMMUTING PATTERNS IN AREA LABOR MARKET ANALYSIS

A map suggesting "have" and "have not" counties, in terms of having job opportunities in manufacturing for their local people, has been published by the Indiana Economic Council. This map shows estimates of the absolute difference between the number of jobs provided by firms in a county and the number of resident factory workers, as of the Spring of 1950. The factory job counts are from the Bureau of Old Age and Survivors Insurance report, and the counts of workers in manufacturing from the 1950 Census of Population. This technique is more safely used when large differences are found.

Contrasted with this method is a map of Indiana published by the Indiana State Employment Service, whereon percentages indicate the distribution of employees by county of residence for major employers in selected industrial areas.

"Are the Implications of 'Factory Commuting' Considered in Your Long-Range Planning?," a 4-page article appearing in the November 1952 issue of the *News Bulletin*, published by the Indiana Economic Council, 140 N. Senate Ave., Indianapolis 4, Ind.

"Survey of Commuting Patterns in Selected Indiana Areas," a 3-page report by the Indiana Employment Security Division, Indiana State Employment Service, 141 S. Meridian St., Indianapolis, Ind. 1947.

RURAL INDUSTRIES AND AGRICULTURAL DEVELOPMENT

Rural industries accounted in 1947 for about 10 percent of the total number of production workers in manufacturing in the United States, but from 1939 to 1947 employment in such industries expanded at a lesser rate than for all manufacturing. Agricultural underemployment is shown to be most acute in the seven Southeastern States, where an estimated potential of a million farm workers exists for all-farm employment in the face of a decline of 770,000 farm workers 1940-1948 and a net migration of more than two million persons out of the area during the same period. It is concluded that the expansion of rural industries cannot be an important solution to a problem of this magnitude, although it should be encouraged. It is proposed that efforts to create off-farm jobs should be concentrated on non-rural industries such as the machinery industries which from 1939 to 1947 accounted for over one-fourth of the national expansion in manufacturing employment, although a very small portion of this occurred in the Southeast. As the major location factor in many machinery fields is a source of skilled and semi-skilled workers, programs for training such workers in the Southeast should be developed.

Rural Industries and Agricultural Development, by Stefan H. Robock, a 15-page reprint from the August 1952 issue of the *Journal of Farm Economics*, American Farm Economic Association, Menasha, Wis.

EMPLOYMENT DATA FOR STATES AND AREAS

The extent to which the manufacturing industry has shifted from the East to the South and West since the end of World War II is indicated in a recent report on employment, hours and earnings, by State and area, for the period 1947-51. This volume presents in varying detail employment data for 102 metropolitan areas.

Another current compilation indicates employment trends in 100 metropolitan areas 1947-51 for privately operated establishments in nonagricultural industries and, where available, employment trends for government units (Federal, State, and local).

Employment, Hours and Earnings: State and Area Data 1947-51 is available from the Bureau of Labor Statistics, Department of Labor, Washington 25, D. C. 1952. 90 pp. Free.

Employment in Metropolitan Areas: Employment Trends, 1947-51, 100 Metropolitan Areas, is available from the Bureau of Labor Statistics, U. S. Department of Labor, Washington 25, D. C. 1952. Free.

NEGRO EMPLOYMENT AND ECONOMIC STATUS

A recent bulletin on this subject continues more than a half century of reporting in this field by the Bureau of Labor Statistics. It covers growth in Negro population 1900-1950, significant population changes 1940-50, educational status 1940 and 1950, recent labor force and employment trends, and income and wages, and includes a brief annotated bibliography on these subjects.

Negroes in the United States: Their Employment and Economic Status, Bulletin No. 1119, is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. 1952. 58 pp. 30 cents.

METROPOLITAN PLANNING

The proceedings of the Detroit Metropolitan Area Regional Commission's second annual conference cover such subjects as the planning problems of local units of government and cooperation between them, township planning and development problems, planning for industrial growth, traffic and parking, and zoning problems.

1952 Spring Conference: Cooperative Planning for Regional Development, sponsored by Detroit Metropolitan Area Regional Planning Commission, 1002 Cadillac Square Bldg., Detroit 26, Mich. 1952. 77 pp.

APPROACH TO URBAN PLANNING

A symposium review of some basic principles and problems underlying urban planning is now available. Included are discussions of the planning process, land use and zoning, redevelopment, transportation, and fiscal programming; also a 37-page annotated bibliography.

An Approach to Urban Planning, edited by Gerald Breece and Dorothy E. Whiteman, is available from the Princeton University Press, Princeton, N. J. 1953. 147 pp. \$2.00.

PURPOSES AND OBJECTIVES OF SUBDIVISION REGULATIONS

A manual on land subdivision now available will be useful for both the government official concerned and the land owner who intends to subdivide.

Suggested Land Subdivision Regulations, a publication of the Housing and Home Finance Agency, is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. 1952. 65 pp. 45 cents.

MUNICIPAL DOWNTOWN PARKING SURVEY

A report of the Cleveland City Planning Commission is a model for concise answers to such vital questions as the number of parkers who come downtown, where they come from and where they go downtown, their parking habits, what are the critical problem area blocks, how many downtown parking spaces are available, how many more parking spaces are needed, and what should be done about it.

Cleveland Downtown Parking Survey: Final Report, 1952, 43 pp., and a limited supply of the *Technical Supplement*, 112 pp., presenting statistical data on the survey, are each available from the Cleveland City Planning Commission, 501 City Hall, Cleveland 14, Ohio.

AREA DEVELOPMENT DIVISION PUBLICATIONS

A brief descriptive list of selected publications of the Area Development Division, Office of Industry and Commerce, U. S. Department of Commerce is now available.

"*Selected Publications of the Area Development Division*," may be obtained from the Sales and Distribution Division, Office of Publications Management, U. S. Department of Commerce, Washington 25, D. C. 1953. 2 pp. 5 cents.

REPORTS ON 17 STRATEGIC MATERIALS

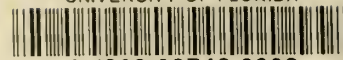
The task of collecting, analyzing, and compiling into usable reports all available data on 17 different minerals necessary to America's economic security and defense has been delegated by the National Security Resources Board to the Bureau of Mines, Department of the Interior. As mentioned in the *Area and Industrial Development Publications* bulletin of January 1953 the report on asbestos was then available, and since that time the additional reports listed below have been released. Separate reports on aluminum, bauxite, beryllium, chromium, cobalt, iron ore, iron and steel scrap, rubber, tin, and tungsten will be released later.

Asbestos \$1.75, Antimony \$1.25, Copper \$3.75, Lead \$3.50, Manganese \$4.25, Nickel \$2.00, and Zinc \$2.75. All of these reports are for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington 25, D. C. at the prices indicated.

MARKETING MAPS OF THE UNITED STATES

In a revision of its 1951 annotated bibliography the Library of Congress lists 387 entries of marketing maps, covering the entire United States, regions, States, and roughly the 40 Standard Metropolitan Areas which were most populous in 1950.

Marketing Maps of the United States: An Annotated Bibliography. Marie C. Goodman and Walter W. Pastow. Sold by the Card Division, Library of Congress, Washington 25, D. C. 1952. 100 pp. 70 cents.



SOURCES OF INFORMATION ON U. S. MARKET

Government and private publications which contain data on the United States market, both national and regional, are listed and described briefly in a recent bibliography.

Sources of Information on the United States Market, World Trade Series No. 339, Business Information Service, is available from the Sales and Distribution Division, Office of Publications Management, U. S. Department of Commerce, Washington 25, D. C. 1952. 20 pp. 20 cents.

Prepared by *Sterling R. March*, Area Development Division

U. S. DEPARTMENT OF COMMERCE

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